



Treasury Information Processing Support Services

COTR Pre-Award Activities

Speakers:

Alison Crichton

Marge Karlsen

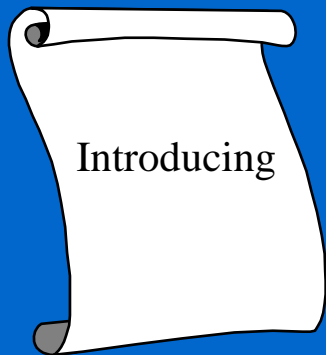
Glenda Harbin

Kandice Carter & Joel Signor

Loucious McKenzie



COTR Pre-Award Activities

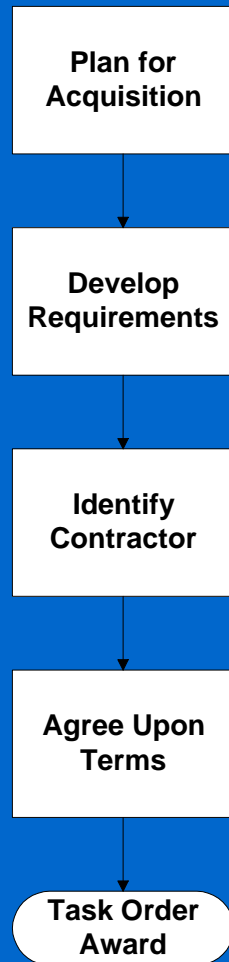


- TIPSS-2 Work Flow Diagram
 - Presenter: Alison Crichton
- Requirements Analysis Team
 - Presenter: Marge Karlsen
- RFI Process
 - Presenter: Glenda Harbin
- Award Process
 - Presenters: Kandice Carter & Joel Signor
- Website Update
 - Presenter: Loucious McKenzie

TIPSS-2 Work Flow Diagram



Alison



- Plan for Acquisition
- Develop Requirements
- Identify Contractor
- Agree Upon Terms
- Task Order Award

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Plan for Acquisition

- Acquisition Support Organization (ASO)
- Located in NCFB(202-283-0910)
- Acquisition Planning Support
- Requirements Analysis Support
- Acquisition Processing Support
- For all Acquisition Vehicles
- We don't need a Requisition to start work

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Develop Requirements

- Develop Statement of Work (SOW)
 - Term
 - Completion
 - Performance-Based
- Develop Independent Government Cost Estimate (IGCE)
 - Base period
 - Option periods

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Identify Contractor

- Competitive Selection
 - Standard
 - Request For Information (RFI)
 - Best Value
- Sole Source Selection
 - Follow-on
 - Unique Requirements
 - Urgency

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Agree Upon Terms

- Pre-Task Meeting
 - Introduce primary players
 - Clarify requirements
 - Address administrative issues
- Negotiations
 - Appropriate skill-mix
 - Travel
 - Other Direct Costs

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Task Order Award



Now the fun
really begins!

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Requirements Analysis Team



Marge

- Team Members
- Acquisition Planning Support
- Requirements Analysis Support
- Acquisition Processing Support

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Team Members

- Marge Karlsen, Team Facilitator
- Loucious McKenzie, Acquisitions Support Office, NCFB
- Glenda Harbin
- Marcella Edmondson

TIPSS-2 Hotline: (202) 283-1110

TIPSS-2 Mailbox: *tipss or tipss@irs.gov

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Requirements Analysis Support

- Developing the SOW
- Reviewing the SOW
- Developing the IGCE

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Developing the SOW

Uniform Contract Format from the FAR:

Section C - Description/specifications/work statement

Section D - Packaging and marking

Section E - Inspection and acceptance

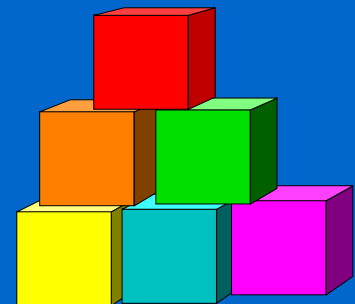
Section F - Deliveries or performance

Section G - Contract administration data

Section H - Special contract requirements

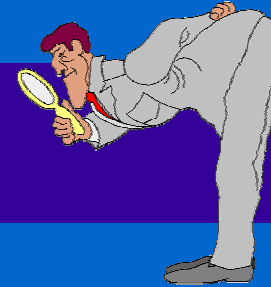
Section I - Contract clauses

Section J - List of attachments



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Reviewing the SOW



- Terminology
- Language Style
- Definitive and Specific Requirements
- Documents and References
- Document Organization
- Authority/Direction
- Realism
- Ambiguity/Conflicting Statements

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Developing the IGCE

- Determine Labor Categories needed
- Estimate hours needed per labor category
- Estimate Other Direct Costs (ODCs)
 - Calculate Travel Costs
 - Local
 - Non-local
- Repeat for all option periods

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Acquisition Processing Support

- Developing the Task Placement Request Form
- Developing the Sole-Source Justification (if needed)

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Developing the Task Placement Request Form

- COTR Nomination
- Request for a Pre-Task Meeting
- Task Placement Requirements:
 - Task Area (ISS, TSS, OMS, OSS)
 - CMM Level 2 Contractor (Software Development?)
 - Award Method (Un definitized Award Authorized?)
 - Task Type (Term, Completion, Performance-Based)
- Contractor Selection Methodology
- Contractor Eligibility
- Requested Contractor

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Developing the Sole-Source Justification

If requesting a sole-source, provide only one justification:

- Urgency
- Unique Requirements
- Follow-on

RFI Process



Glenda

- Develop RFI
- Obtain RFI Responses
- Evaluate RFI Responses

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Develop RFI

- Task Title
- Place of Performance
- Period of Performance
- Background
- Statement of Need
- Contractor Special Skill Requirements & Required Experience
- Evaluation Criteria

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Obtain RFI Responses

- Task Area Contractors
- Maximum page length
- Due date and time
- New Work or Incumbent

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Evaluate RFI Responses

- RFI Evaluation Matrix and justifications
- Oral Presentations, if needed
- Competitive proposals, if needed
- Task Placement Request (TPR) Form

Award Process



Kandice
& Joel

- Contractor Selection
- Pre-Task Meeting
- Proposal Process
- Negotiations
- Task Order Award

